

### Purpose

This exercise describes the steps for logging into Core – CT. The following are step-by-step instructions that will guide you through this activity.

### Procedure

**Step 1:** Log into the PE93TRN environment using with your **User ID** and the **Password** provided to you.

Click **Sign In**.

The **Portal** page is displayed.



*You have successfully completed the steps to logging Into Core-CT.*

## Purpose

This exercise describes the steps to submit a P-Card request. The following are step-by-step instructions that will guide you through this activity.

## Procedure

**Step 1:** From the Portal page, navigate to *Main Menu > Core-CT Financials > Purchasing > Procurement Card > Add/Update Procurement Card*.

The **Add/Update Procurement Card** page displays.

On the **Add a New Value** tab:

Enter the Employee ID in the **Empl ID** field (use the magnifying glass to search).

Click the **Add** button.

Favorites ▾ Main Menu ▾ > Purchasing ▾ >

Core-CT

Add/Update Procurement Card

Find an Existing Value Add a New Value

Empl ID 🔍

Add

Find an Existing Value | Add a New Value

## Procedure

**Step 2:** Fill in the applicable fields in the **Application** section:

The screenshot shows the 'Application Section' of a Procurement Card request form. The form is titled 'Procurement Card' and includes the following fields:

- Account Type:** A dropdown menu.
- Name on Card (if other than CARDHOLDER):** A text input field.
- Business Unit:** A dropdown menu.
- Card Type:** A dropdown menu.
- Business Address:** Fields for Address 1, Address 2, City, State, Zip Code, and Country.
- Home Address:** Fields for Address 1, Address 2, City, State, Zip Code, and Country.
- Phone Information:** Fields for Home, Work, and Cell phone numbers.
- Account Spend Limits / Controls:** Fields for Cycle Purchase Limit (CPL), Single Purchase Limit (SPL), Monthly Transaction Limit, and Daily Transaction Limit.
- Merchant Category Codes:** A dropdown menu and a table with columns for MCCG and Description.

**Step 3:** Fill in the applicable fields in the **Administrator** section:

The screenshot shows the 'Administrator Section' of a Procurement Card request form. The form is titled 'Administrator Section' and includes the following fields:

- Account Spend Limits / Controls:** Fields for Cycle Purchase Limit (CPL), Single Purchase Limit (SPL), Monthly Transaction Limit, and Daily Transaction Limit.
- Merchant Category Codes:** A dropdown menu and a table with columns for MCCG and Description.
- Company:** Fields for Company ID and Hierarchy.
- Comments:** A table with columns for Entered by, Entered on, and Comments.
- Buttons:** 'Save' and 'Submit for Approval' buttons.

### Procedure

**Step 4:** Enter a comment in the **Comments** field.

The screenshot displays the 'Add/Update PCard Request' form in the Core-CT system. The form includes several sections: 'Administrator Section' with 'Account Spend Limits / Controls' (Cycle Purchase Limit: 15,000.00, Single Purchase Limit: 2,500.00, Monthly Transaction Limit: 30, Daily transaction Limit: 5) and 'Merchant Category Codes' (Include/Exclude the following dropdown, MCOG, Description table). Below these is the 'Company' section with 'Company ID' and 'Hierarchy' search fields. The 'Comments' section is highlighted with a red box and contains a table with columns 'Entered by', 'Entered on', and 'Comments'. At the bottom, there are 'Entered by' and 'Last Modified by' fields, and 'Save' and 'Submit for Approval' buttons.

Entered by	Entered on	Comments

## Procedure

**Step 5:** Click the **Submit for Approval** button.

The screenshot displays the 'Add/Update PCard Request' form in the Core-CT system. The form includes several sections: 'Administrator Section' with 'Account Spend Limits / Controls' (Cycle Purchase Limit [CPL] 15,000.00, Single Purchase Limit [SPL] 2,500.00, Monthly Transaction Limit 30, Daily transaction Limit 5) and 'Merchant Category Codes' (Include/Exclude the following dropdown, MCOG, Description table). Below these are 'Company' fields (Company ID, Hierarchy) and a 'Comments' section with a table for 'Entered by', 'Entered on', and 'Comments'. At the bottom, there are 'Save' and 'Submit for Approval' buttons, with the latter highlighted by a red box.

✔ You have successfully completed the steps to submit a P-Card request.

## Purpose

This exercise describes the steps to update the cardholder profile. The following are step-by-step instructions that will guide you through this activity.

## Procedure

**Step 1:** From the Portal page, navigate to *Main Menu > Core-CT Financials > Purchasing > Procurement Card > Definitions > Cardholder Profile*.

The **Cardholder Profile** page is displayed.

Enter **Your ID** in the **Employee ID** field.

Click the **Search** button.

Favorites > Main Menu > Purchasing > Procurement Cards > Definitions

Core-CT

### Cardholder Profile

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Employee ID begins with [ ]

Name begins with [ ]

Last Name begins with [ ]

Address Line 1 begins with [ ]

City begins with [ ]

State begins with [ ]

Case Sensitive

Limit the number of results to (up to 300): [ 300 ]

Search Clear Basic Search Save Search Criteria

### Procedure

**Step 2:** Click the **Card Data** tab.

The screenshot shows the Core-CT web application interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this is a breadcrumb trail: 'Home > Worklist > Add to Favorites > Sign out'. The main content area is titled 'Personal Data' and contains a 'Card Data' tab highlighted with a red box. Below the tab, there are fields for 'Name (last-first,initial)', 'Employee ID', 'Personal Status', and 'Telephone'. There are also sections for 'Home Address' and 'Mailing Address', each with fields for 'Country', 'Address 1', 'Address 2', 'Address 3', 'City', 'County', 'State', and 'Postal'. At the bottom of the form, there are buttons for 'Save', 'Return to Search', and 'Notify'.

**Step 3:** Click the **Additional Information** link,

The screenshot shows the Core-CT web application interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this is a breadcrumb trail: 'Home > Worklist > Add to Favorites > Sign out'. The main content area is titled 'Personal Data' and contains a 'Card Data' tab. Below the tab, there is a table with columns: 'Business Unit', 'Card Issuer', 'Card Number', 'Proxies', 'Default Divisn', and 'MCCG Codes'. The table contains one row of data: 'DOTM1', 'JPMC', '\*\*\*\*\*1567', 'Proxies', 'Default Divisn', 'MCCG Codes'. The 'Additional Information' link is highlighted with a red box. At the bottom of the form, there are buttons for 'Save', 'Return to Search', and 'Notify'.

### Procedure

**Step 4:** Click the **Proxies** link.

The screenshot shows the Core-CT interface for updating a cardholder profile. The user is logged in as William Lederman. The 'Card Data' tab is selected, displaying a table of card information. The 'Proxies' link in the table is highlighted with a red box, indicating the next step in the procedure.

*Business Unit	*Card Issuer	*Card Number	Proxies	Default Distrib	MCOG Codes
DOTM1	JPMC	*****1567	Proxies	Default Distrib	MCOG Codes



### Procedure

**Step 5:** Enter (or search for) a **User ID** in the User ID field.

The screenshot shows the 'Assign Proxies' dialog box. At the top, it displays 'JPMC' and 'Card Number \*\*\*\*\*1567'. Below this is a table with the following columns: \*User ID, Description, \*Role, Requester Default, and Buyer Default. The \*User ID field is highlighted with a red box. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

**Step 6:** Choose a role from the **Role** dropdown.

Click the **OK** button.

The screenshot shows the 'Assign Proxies' dialog box. The table now contains one row: \*User ID: 007423, Description: DOT-Sherman Earl T, \*Role: [dropdown menu]. The \*Role dropdown menu and the 'OK' button are highlighted with red boxes.

### Procedure

**Step 7:** Click the **Default Distrib** link.

The screenshot shows the 'Cardholder Profile' page for William Lederman. Under the 'Card Data' tab, there is a table with the following data:

*Business Unit	*Card Issuer	*Card Number	Proxies	Default Distrib	MCCG Codes
DOTMT	JPMC	*****567	Proxies	<b>Default Distrib</b>	MCCG Codes

The 'Default Distrib' link in the table is highlighted with a red box. Below the table are buttons for 'Save', 'Return to Search', and 'Notify'.

**Step 8:** Enter the appropriate Chartfield information.

Click **OK**.

The screenshot shows the 'Default Accounting Distribution' dialog box. It contains the following sections:

- Default Values:** Ship To (text field)
- Distribution Choices:**
  - Use Single-Line Distribution
  - Use Multi-Line Distribution
- Use Single-Line Distribution:**
  - Account Distribution:** A table with columns: \*GL Unit, Fund, Dept, SD, Program, \*Account, Chartfield 1, Chartfield 2, Bud Ref, PC Bus Unit, Project. The first row contains: STATE, [blank], [blank], [blank], [blank], [blank], 54050, [blank], [blank], [blank], [blank].

The 'Account Distribution' table and the 'OK' button at the bottom left are highlighted with red boxes.

## Procedure

**Step 9:** Click the **Save** button.

The screenshot shows the Core-CT web application interface for updating a cardholder profile. The user is logged in as 'Ledeman, William'. The 'Card Data' tab is active, showing a table with columns for Business Unit, Card Issuer, Card Number, Process, Default Distrib, and MCCG Codes. The 'Save' button is highlighted with a red box, indicating the final step in the process.

*Business Unit	*Card Issuer	*Card Number	Process	Default Distrib	MCCG Codes
DOTM1	JPMC	*****567	Process	Default Distrib	MCCG Codes



*You have successfully completed the steps to updating the Cardholder profile.*